# BEACON Support Team (BST) Lead Meeting

**August 22, 2006**

# Agenda

- Project Status Update
- Agency Scorecard
- Improving Communications
- Project Governance Structure Update
- Workforce Transition Overview
- Upcoming Project Activities
- Questions and Answers



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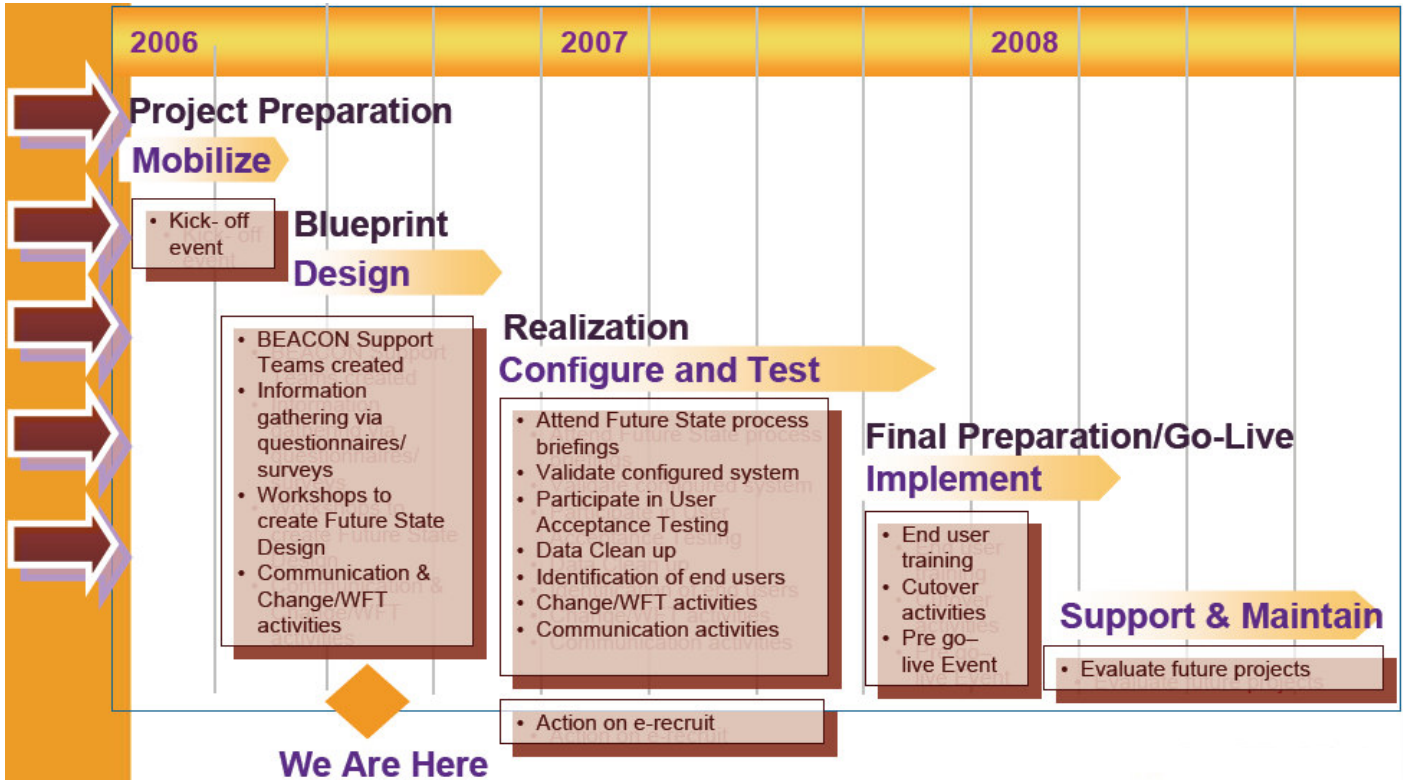
# Project Update

- Project Timeline
- Project Staffing and Resources



# Agency Scorecard

# Agency Scorecard Overview

- Agency scorecard is a useful tracking tool that:
  - Captures a snapshot of current progress each agency is making to complete key BEACON HR/Payroll Project activities;
  - Identifies key activities that agencies may need additional support from the BEACON HR/Payroll Project Team to successfully complete in a timely manner; and
  - Allows agencies to document concerns to the BEACON HR/Payroll Project Team, which may trigger the need for additional support.

- Agency scorecard tracks progress with various BEACON HR/Payroll Project activities such as:
  - Attendance at monthly BST Sponsor/Lead meetings;
  - Communications survey requests;
  - Position classification requests;
  - Design session questionnaire responses;
  - BST member listing request; and
  - Workforce transition information requests.

# Agency Scorecard Status

- When documenting the status of each task, the following color coding is used:
  - G – **Green:** Task completed before or on due date, no additional support needed by BEACON HR/Payroll Project Team.
  - Y – **Yellow:** Task not completed within 5 business days after due date, potential concerns may exist that require discussion with BEACON HR/Payroll Project Team.
  - R – **Red:** Task not completed; BEACON HR/Payroll Project Team support required immediately.
  - P – **Pink:** Task completion pending with special circumstances; BEACON HR/Payroll Project Team support required immediately.
- Each cell in the agency scorecard spreadsheet is highlighted with the appropriate color.

# Agency Scorecard Management

- The Agency scorecard will be updated weekly to reflect updates to tracking various change management activities and will be posted in the password protected area on the BEACON HR/Payroll Project website.
- Ongoing agency scorecard meeting, workshop and information requests will be focused on change management/communication activities.
- If BSTs have questions pertaining to the agency scorecard items, please contact Edward Brodsky at 919-431-6520 or email edward.brodsky@ncosc.net.

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# Scorecard – Questionnaire Response

| For Period Ending: August 10, 2006 | Design Session Questionnaires - 1st Wave | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| DUE DATE | 6/28/06 | 6/28/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 | 7/12/06 |
| ACTIVITY / AGENCY | Organizational Mgmt. | Holiday & Payroll Calendars & Pay Structure | Earnings | Time Mgmt. for 24x7 Support Staff | Personnel Administration | Time Quotas & FMLA | Training & Events Mgmt. | Deductions | Time Mgmt. for Health Services Staff | Personnel Development | Benefits Administration | Checks & Garnishments | Check/ACH Creation & Distrib. | Off-Cycle Prcssing/Claims | Integration to FI/CO & 3rd Party Remit. - DOT | Integration to FI/CO & 3rd Party Remittance - CP | Time Mgmt. for Reg. Salaried or Hrly Employees | Time Mgmt. for Law Enfrcmt /Firefighters/ Emerg. Mgmt. | Tax Calc., Tax Rptg & Non-Resident Alien - DOT | Tax Calc., Tax Rptg. & Non-Resident Alien - CP | Concurrent Employment | Leaves of Absence | Integration with FI/Payroll | Time Mgmt. for Educational Staff |
| Administrative Office of the Courts | G | G | G | G | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| Crime Control & Public Safety | G | G | G | N/A | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | G | N/A | G | G | G | N/A | N/A |
| Department of Admin./Lt. Governor's Office | G | G | G | G | G | G | G | G | N/A | G | G | G | Y | G | N/A | G | G | G | N/A | G | G | G | G | N/A |
| Department of Agriculture | G | G | G | G | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | G | G | G | G | G | G | N/A |
| Department of Commerce | G | G | G | G | G | G | G | G | G | G | G | G | ? | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| Department of Corrections | G | G | G | G | G | G | G | G | G | G | G | G | G | G | N/A | R | G | G | N/A | N/A | G | G | G | N/A |
| Department of Cultural Resources | G | G | G | N/A | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| Dept. of Environment & Natural Rsrces. | G | G | G | G | G | G | G | G | G | N/A | G | G | G | G | N/A | G | G | G | N/A | G | R | G | G | G |
| Dept. of Health & Human Services | G | G | G | G | G | G | G | G | G | G | G | G | G | G | N/A | G | G | G | N/A | G | G | G | G | G |
| Department of Insurance | G | G | G | N/A | G | G | G | G | N/A | G | G | G | G | N/A | N/A | G | G | N/A | N/A | G | N/A | G | G | N/A |
| Department of Justice | G | G | G | G | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | G | N/A | G | G | G | G | N/A |
| Dept. of Juvenile Justice & Delinq. Prev. | Y | Y | Y | Y | Y | Y | Y | Y | N/A | Y | Y | Y | R | Y | N/A | Y | Y | N/A | N/A | Y | Y | Y | Y | N/A |
| Department of Labor | G | G | G | N/A | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| Department of Public Instruction | G | G | G | N/A | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| Department of Revenue | G | G | G | G | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | N/A | G | G | G | N/A |
| Department of Transportation | G | G | G | G | G | G | G | G | N/A | G | G | G | G | G | G | N/A | G | G | G | N/A | G | G | G | N/A |
| Employment Security Commission of NC | G | G | G | G | G | G | G | G | N/A | G | G | N/A | N/A | G | N/A | G | G | N/A | N/A | N/A | N/A | G | G | N/A |
| General Assembly - Fiscal Research | R | R | R | R | R | R | R | R | N/A | R | R | R | R | R | N/A | R | R | R | N/A | R | R | R | R | N/A |
| Education Lottery | G | G | G | N/A | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| Information Technology Services | G | G | G | G | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | G | G | G | R | N/A |
| NC Community College System | G | G | G | N/A | G | G | N/A | G | N/A | G | G | G | N/A | G | N/A | N/A | G | N/A | N/A | G | G | G | G | N/A |
| NC Housing Finance Agency | G | G | G | N/A | G | G | G | G | N/A | G | G | N/A | N/A | N/A | N/A | N/A | G | N/A | N/A | N/A | N/A | G | G | N/A |
| Office of Administrative Hearings | G | G | G | N/A | G | G | G | G | N/A | G | G | G | G | N/A | N/A | G | G | N/A | N/A | N/A | G | G | G | N/A |
| Office of the State Auditor | G | G | G | G | G | G | G | G | G | G | G | G | G | G | N/A | G | G | G | N/A | G | G | G | G | G |
| Office of the State Controller | G | G | G | G | G | G | G | G | N/A | N/A | N/A | G | G | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| Department of the Secretary of State | G | G | G | N/A | G | G | N/A | G | N/A | G | G | G | G | G | N/A | R | G | R | N/A | G | G | G | G | N/A |
| State Board of Elections | G | G | G | G | G | G | G | G | G | G | G | G | G | G | N/A | G | G | G | N/A | G | G | G | G | G |
| Office of State Budget & Mgmt./Gov's Office | G | G | G | N/A | G | G | G | G | N/A | G | G | G | N/A | N/A | N/A | N/A | G | N/A | N/A | N/A | N/A | G | G | N/A |
| Department of State Treasurer | G | G | G | N/A | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| Wildlife Resources Commission | G | G | G | G | G | G | G | G | N/A | G | G | G | G | G | N/A | G | G | G | N/A | G | G | G | G | N/A |
| Office of State Personnel | G | G | G | G | G | G | G | G | G | G | G | N/A | N/A | N/A | N/A | N/A | G | G | N/A | G | G | G | G | G |
| NC School of Science & Math | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| State Health Plan | G | G | G | N/A | R | G | G | G | N/A | G | G | G | G | G | N/A | G | G | N/A | N/A | G | G | G | G | N/A |
| **Overall Scorecard Scoring** | | | | | | | | | | | | | | | | | | | | | | | | |
| Number green | 30 | 30 | 30 | 17 | 29 | 30 | 28 | 30 | 7 | 28 | 29 | 27 | 23 | 25 | 1 | 23 | 30 | 12 | 2 | 23 | 25 | 30 | 28 | 5 |
| Percentage green | 94% | 94% | 94% | 89% | 91% | 94% | 93% | 94% | 100% | 93% | 94% | 93% | 85% | 93% | 100% | 85% | 94% | 86% | 200% | 92% | 89% | 94% | 90% | 100% |

**COLOR CODES**

White - Not begun

Blue - Complete

Tan - Delayed

Yellow-Request not Complete, deadline pending 5-day grace pd

Red-Request not Complete, deadline past 5 day grace pd

Pink-Completion pending w/special circumstances

Green - Information Request Completed (C - Request completed, returned)

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# Scorecard – BST Meetings and Information Requests

| For Period Ending: August 10, 2006 | BST Sponsor Meetings | | | | | | BST Lead Meetings | | | | | COLOR CODES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| DUE DATE | 5/10/06 | 6/27/06 | 7/25/06 | 8/29/06 | 9/26/06 | 10/24/06 | 6/20/06 | 7/18/06 | 8/22/06 | 9/19/06 | 10/17/06 | | | |
| ACTIVITY / AGENCY | BST Sponsor Orientations | BST Sponsor Meetings | BST Sponsor Meeeting | BST Sponsor Meeting | BST Sponsor Meeting | BST Sponsor Meeting | BST Lead Orientations | BST Lead Meeting | BST Lead Meeting | BST Lead Meeting | BST Lead Meeting | White - Not begun | Blue - Complete | Pink - Delayed |
| Administrative Office of the Courts | G | G | G | | | | G | G | | | | | | |
| Crime Control & Public Safety | G | G | G | | | | G | G | | | | | | |
| Department of Admin./Lt. Governor's Office | G | G | G | | | | G | G | | | | | | |
| Department of Agriculture | G | G | G | | | | G | G | | | | | | |
| Department of Commerce | G | G | G | | | | G | G | | | | | | |
| Department of Corrections | G | G | G | | | | G | G | | | | | | |
| Department of Cultural Resources | G | G | G | | | | G | G | | | | | | |
| Dept. of Environment & Natural Rsrces. | G | G | G | | | | G | G | | | | | | |
| Dept. of Health & Human Services | G | G | G | | | | G | G | | | | | | |
| Department of Insurance | G | G | G | | | | G | G | | | | | | |
| Department of Justice | G | Y | G | | | | G | G | | | | | | |
| Dept. of Juvenile Justice & Deling. Prev. | G | G | G | | | | G | G | | | | | | |
| Department of Labor | G | G | G | | | | G | G | | | | | | |
| Department of Public Instruction | R | G | G | | | | G | G | | | | | | |
| Department of Revenue | G | G | G | | | | G | G | | | | | | |
| Department of Transportation | R | G | G | | | | G | G | | | | | | |
| Employment Security Commission of NC | G | Y | R | | | | G | G | | | | | | |
| General Assembly - Fiscal Research | G | R | R | | | | G | R | | | | | | |
| Education Lottery | R | Y | G | | | | G | G | | | | | | |
| Information Technology Services | G | G | G | | | | G | G | | | | | | |
| NC Community College System | G | R | R | | | | G | G | | | | | | |
| NC Housing Finance Agency | G | G | G | | | | G | G | | | | | | |
| Office of Administrative Hearings | G | G | G | | | | G | G | | | | | | |
| Office of the State Auditor | G | G | G | | | | G | G | | | | | | |
| Office of the State Controller | G | G | G | | | | G | G | | | | | | |
| Department of the Secretary of State | G | G | G | | | | G | G | | | | | | |
| State Board of Elections | Y | Y | R | | | | G | G | | | | | | |
| Office of State Budget & Mgmt./Gov's Office | G | G | G | | | | G | G | | | | | | |
| Department of State Treasurer | G | G | G | | | | G | G | | | | | | |
| Wildlife Resources Commission | G | G | G | | | | G | G | | | | | | |
| Office of State Personnel | G | G | G | | | | G | G | | | | | | |
| NC School of Science & Math | N/A | N/A | N/A | | | | N/A | N/A | | | | | | |
| State Health Plan | G | R | R | | | | G | G | | | | | | |
| **Overall Scorecard Scoring** | | | | | | | | | | | | | | |
| **Number green** | 28 | 25 | 27 | | | | 32 | 31 | | | | | | |
| **Percentage green** | 88% | 78% | 84% | 0% | 0% | 0% | 100% | 97% | 0% | 0% | 0% | | | |
| **Number non-green** | 4 | 7 | 5 | 32 | 32 | 32 | 0 | 1 | 32 | 32 | 32 | | | |
| **Percentage non-green** | 13% | 22% | 16% | 100% | 100% | 100% | 0% | 3% | 100% | 100% | 100% | | | |

Yellow-Request not Complete, deadline pending 5-day grace pd

Red-Request not Complete, deadline past 5 day grace pd

Pink-Completion pending w/special circumstances

Green - Information Request Completed (C - Request completed, returned)

| For Period Ending: August 10, 2006 | BST Information Requests | | | | COLOR CODES | | |
|---|---|---|---|---|---|---|---|
| DUE DATE | 5/22/06 | 6/28/06 | 6/14/06 - 6/28/06 | 7/5/06 | | | |
| ACTIVITY / AGENCY | Submit BST Member Contacts | Submit Job Clasification Info. | Agency Leadership Interviews | BST Communications Survey | White - Not begun | Blue - Complete | Pink - Delayed |
| Administrative Office of the Courts | G | G | N/A | G | | | |
| Crime Control & Public Safety | G | G | G | G | | | |
| Department of Admin./Lt. Governor's Office | Y | G | N/A | R | | | |
| Department of Agriculture | G | G | N/A | R | | | |
| Department of Commerce | G | G | N/A | R | | | |
| Department of Corrections | G | G | G | Y | | | |
| Department of Cultural Resources | G | G | G | R | | | |
| Dept. of Environment & Natural Rsrces. | G | G | G | G | | | |
| Dept. of Health & Human Services | G | G | G | G | | | |
| Department of Insurance | G | G | N/A | G | | | |
| Department of Justice | Y | Y | G | R | | | |
| Dept. of Juvenile Justice & Deling. Prev. | G | R | N/A | R | | | |
| Department of Labor | Y | G | G | G | | | |
| Department of Public Instruction | Y | Y | G | R | | | |
| Department of Revenue | Y | Y | G | G | | | |
| Department of Transportation | G | G | G | G | | | |
| Employment Security Commission of NC | G | G | N/A | G | | | |
| General Assembly - Fiscal Research | R | R | N/A | R | | | |
| Education Lottery | Y | R | N/A | G | | | |
| Information Technology Services | G | G | G | G | | | |
| NC Community College System | G | G | N/A | G | | | |
| NC Housing Finance Agency | G | G | N/A | G | | | |
| Office of Administrative Hearings | G | G | N/A | G | | | |
| Office of the State Auditor | G | R | N/A | G | | | |
| Office of the State Controller | G | G | G | G | | | |
| Department of the Secretary of State | Y | G | N/A | R | | | |
| State Board of Elections | G | G | N/A | R | | | |
| Office of State Budget & Mgmt./Gov's Office | G | G | N/A | G | | | |
| Department of State Treasurer | G | G | G | G | | | |
| Wildlife Resources Commission | G | G | N/A | G | | | |
| Office of State Personnel | G | G | N/A | R | | | |
| State Health Plan | Y | Y | N/A | R | | | |
| **Overall Scorecard Scoring** | | | | | | | |
| **Number green** | 23 | 24 | 13 | 19 | | | |
| **Percentage green** | 72% | 75% | 100% | 59% | | | |
| **Number non-green** | 9 | 8 | 0 | 13 | | | |
| **Percentage non-green** | 28% | 25% | 0% | 41% | | | |

Yellow-Request not Complete, deadline pending 5-day grace pd

Red-Request not Complete, deadline past 5 day grace pd

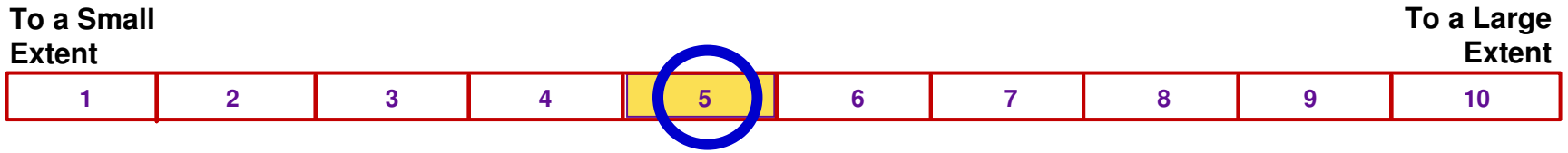
Pink-Completion pending w/special circumstances

Green - Information Request Completed (C - Request completed, returned)

# Improving Communications

# We Need Your Help!

**In our organizational risk assessment, agency leaders ranked our current project communications effectiveness as a 5 out of 10.**




## Positive Comments

- Numerous communications about the project have been sent out to agency leadership, which is great. We are all onboard!
- Agency leadership supports the BEACON HR/Payroll Project, now is the time to communicate about the project to the masses. Remember…you can't communicate enough about this project.

## Needs Improvement

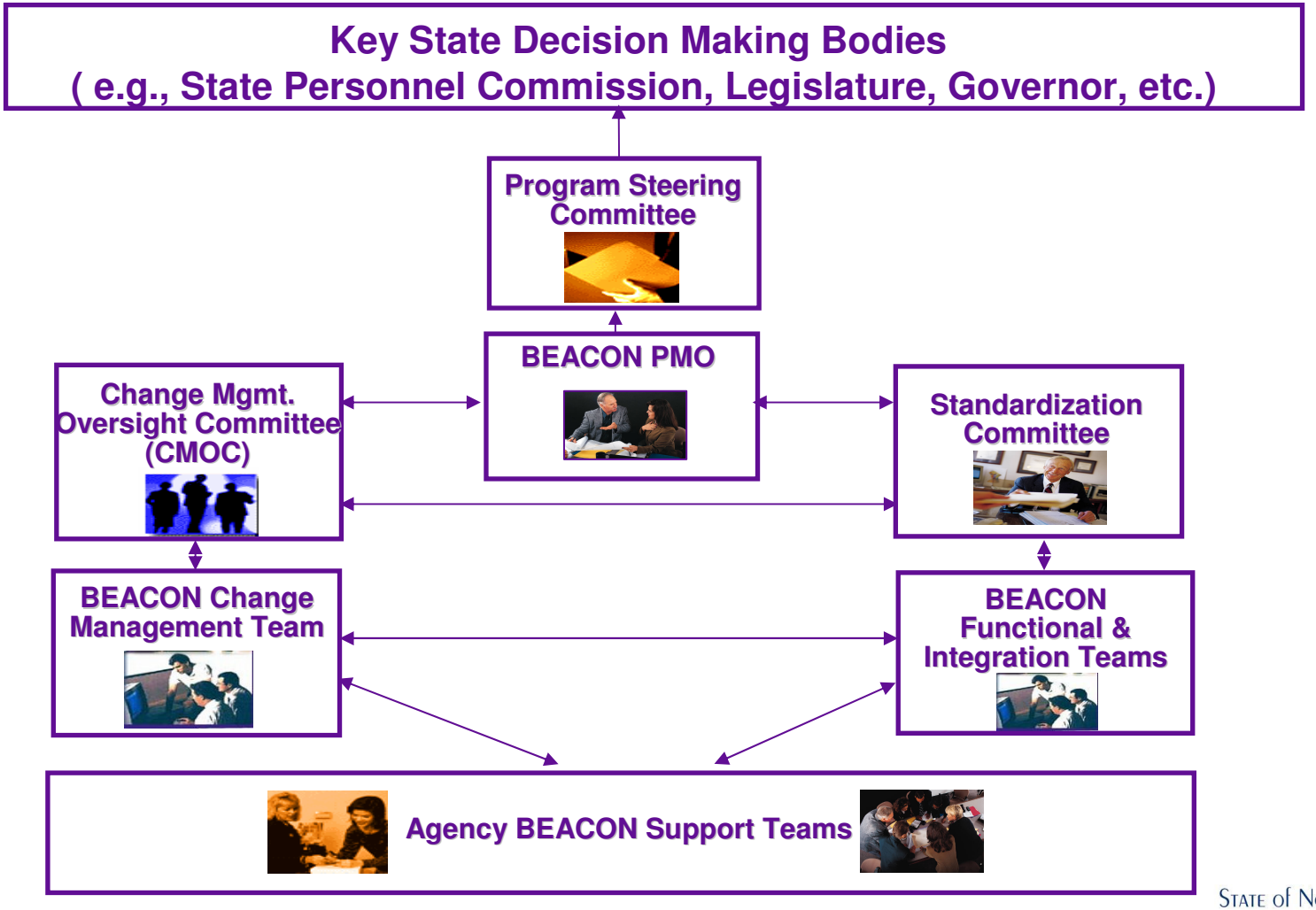
- Increased knowledge, more communication and better understanding is needed to help our people better acceptance the new BEACON HR/Payroll solution.
- Agency employees should be informed of and understand the benefits of the new system and the opportunities it provides for them.

# Improving Communications

- BST Expectations
  - BST Team Leads are expected to take an active and visible role in communicating BEACON HR/Payroll information and promotional materials within their respective agency.
    - Contact your agency SME after workshops
    - Communicate issues and status to Agency leaders
  - BST Team Leads and Communications Agents are expected to plan and conduct targeted BEACON HR/Payroll Project awareness and progress meetings with agency staff on a monthly basis.
    - Identify key agency and departmental meetings
    - Request time on the agenda
- BEACON Team Support
  - The BEACON HR/Payroll Communications Team will provide BST Leads and Communication Agents with a monthly BST Communications Toolkit which will contain relevant information and presentations to be used for awareness building and meetings.
    - Communications timeline
    - BST Leads will be added to the BEACON website as agency contacts
  - Timely website updates and the addition of new password enabled links to BST presentation materials and workshop documentation
  - Onboard new Communications Lead

# Project Governance Structure Update

# Governance Structure



# How We Will Work Together

- **Key State Decision Making Bodies** – Support/approve final decision on process standardization, policy and procedure, and organizational structure (e.g., shared services)
- **Program Steering Committee** – Provides direction consistent with overall BEACON HR/Payroll Project goals; provides highest level of escalation for issues resolution and scope changes
- **BEACON PMO** – Coordinates Change Management Oversight Committee and Standardization Committee activities; makes recommendations to Steering Committee
- **Standardization Committee** – Defines and documents strategy to standardize BEACON HR/Payroll business processes and makes implementation recommendations to BEACON PMO
- **Change Management Oversight Committee** – Sets direction for the BEACON HR/Payroll Project change management approach; makes recommendations to BEACON PMO regarding change management issues
- **BEACON Change Management Team** – Responsible for overall planning and coordination of BEACON HR/Payroll Project change management, communication, organization design and workforce transition activities; makes change management recommendations to Change Management Oversight Committee
- **BEACON Functional/Integration Team** – Responsible for development of HR/Payroll business processes; makes process standardization recommendations to Standardization Committee
- **Agency BEACON Support Teams** – Facilitate and execute BEACON HR/Payroll change management, communication, organization design and workforce transition strategies and plans

# CMOC Members

- Office of State Budget and Management (OSBM)
  - Tom Newsome - Chair
  - Jonathan Womer
  - Jim Dolan
- Office of State Personnel (OSP)
  - Dusty Wall
  - Ann Cobb
  - Drake Maynard
- Office of the State Controller (OSC)
  - Edith Cannady

# Workforce Transition Overview

# What is Workforce Transition?

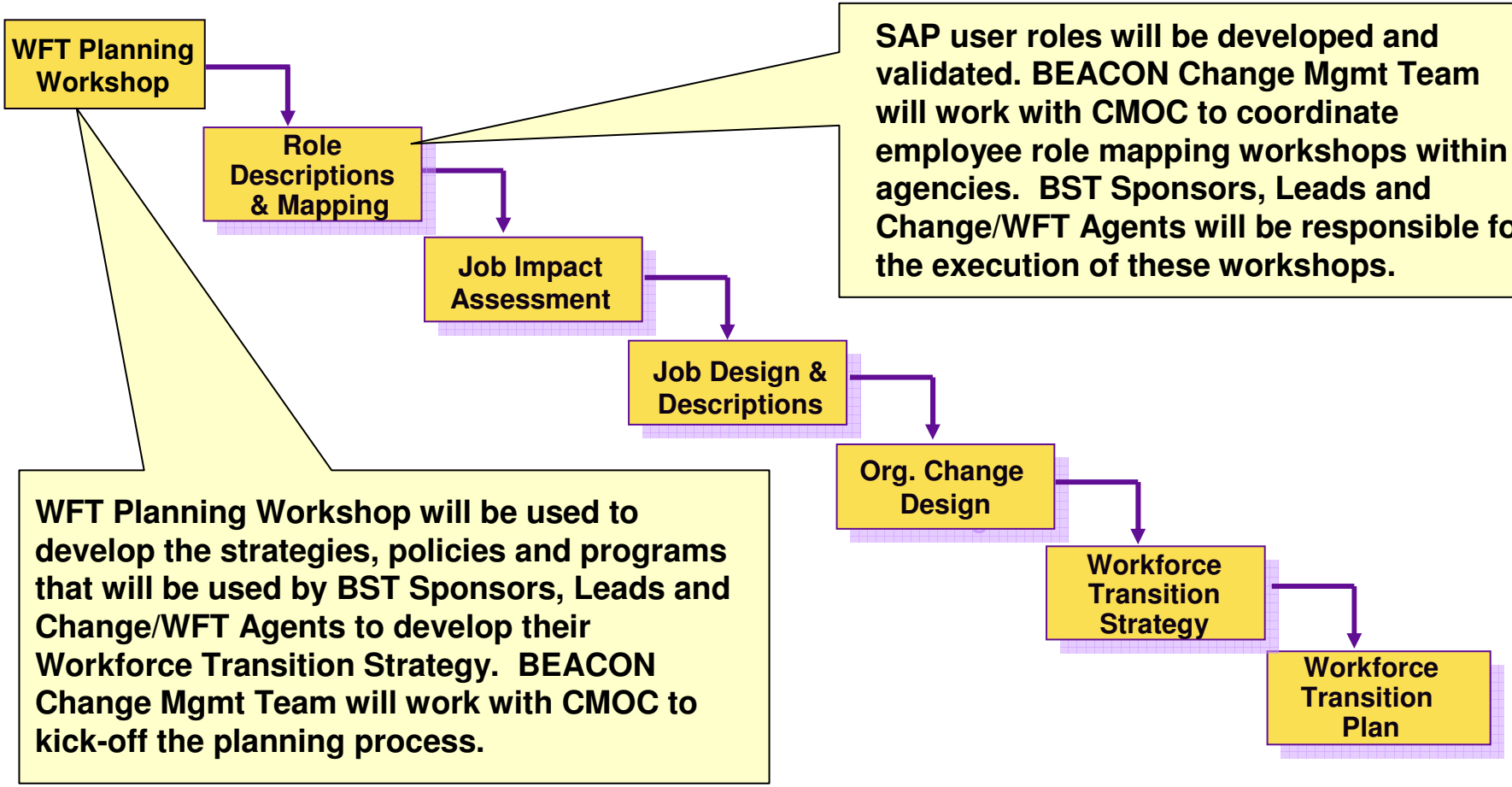
Simply stated:

- Workforce Transition (WFT) is a roadmap for managing all of the BEACON HR & Payroll job changes that will impact the State's workforce.

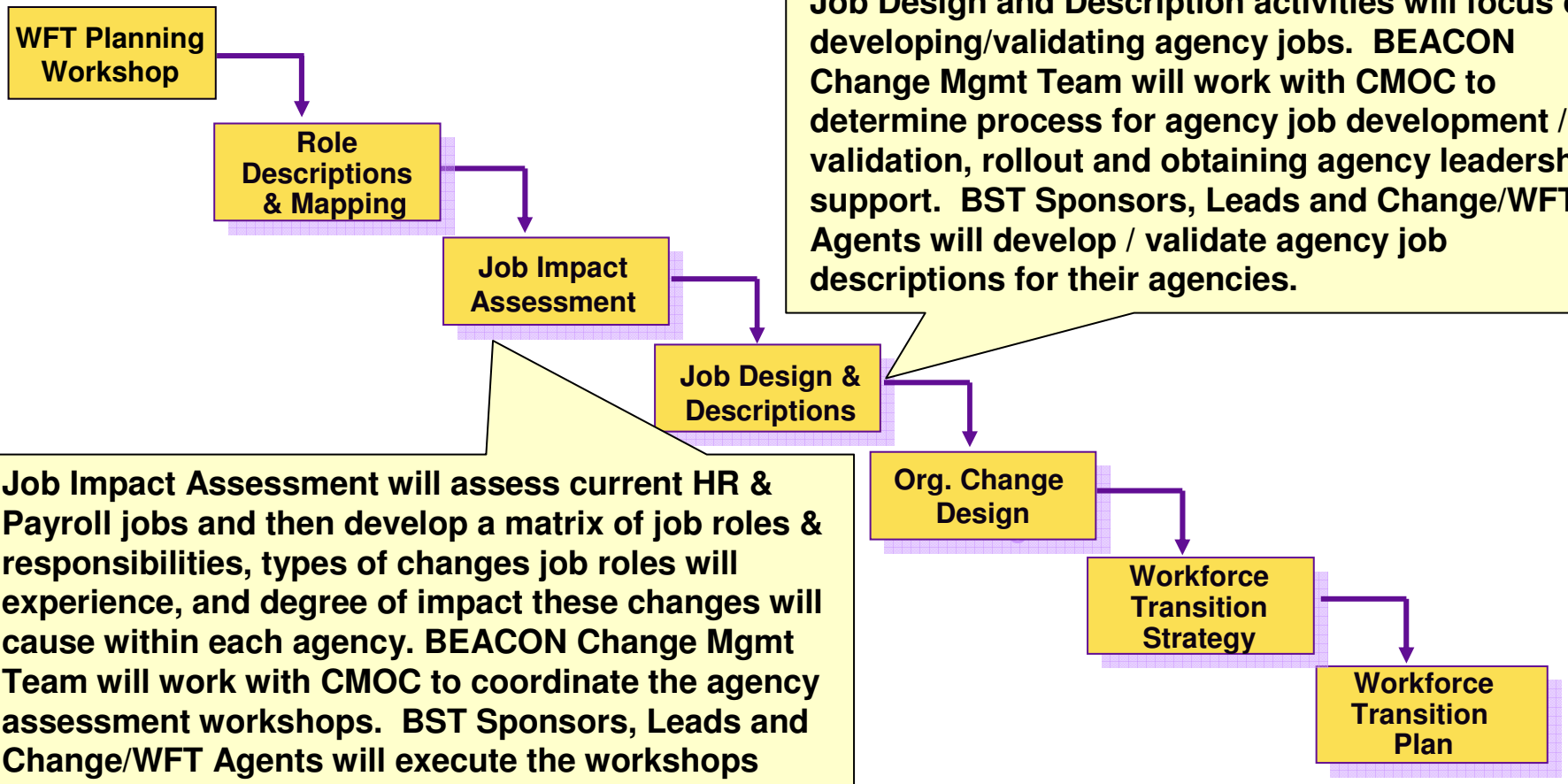
Purpose:

- To provide agencies with an understanding of how jobs will be changing and to guide the Human Resources function in transitioning the workforce into these updated or new jobs.
- It is ***NOT*** a process to eliminate people's jobs or reduce the workforce.
  - Note: Workforce transition activities will address sensitive organizational issues and will require confidentiality

# Workforce Transition Activities & Expectations



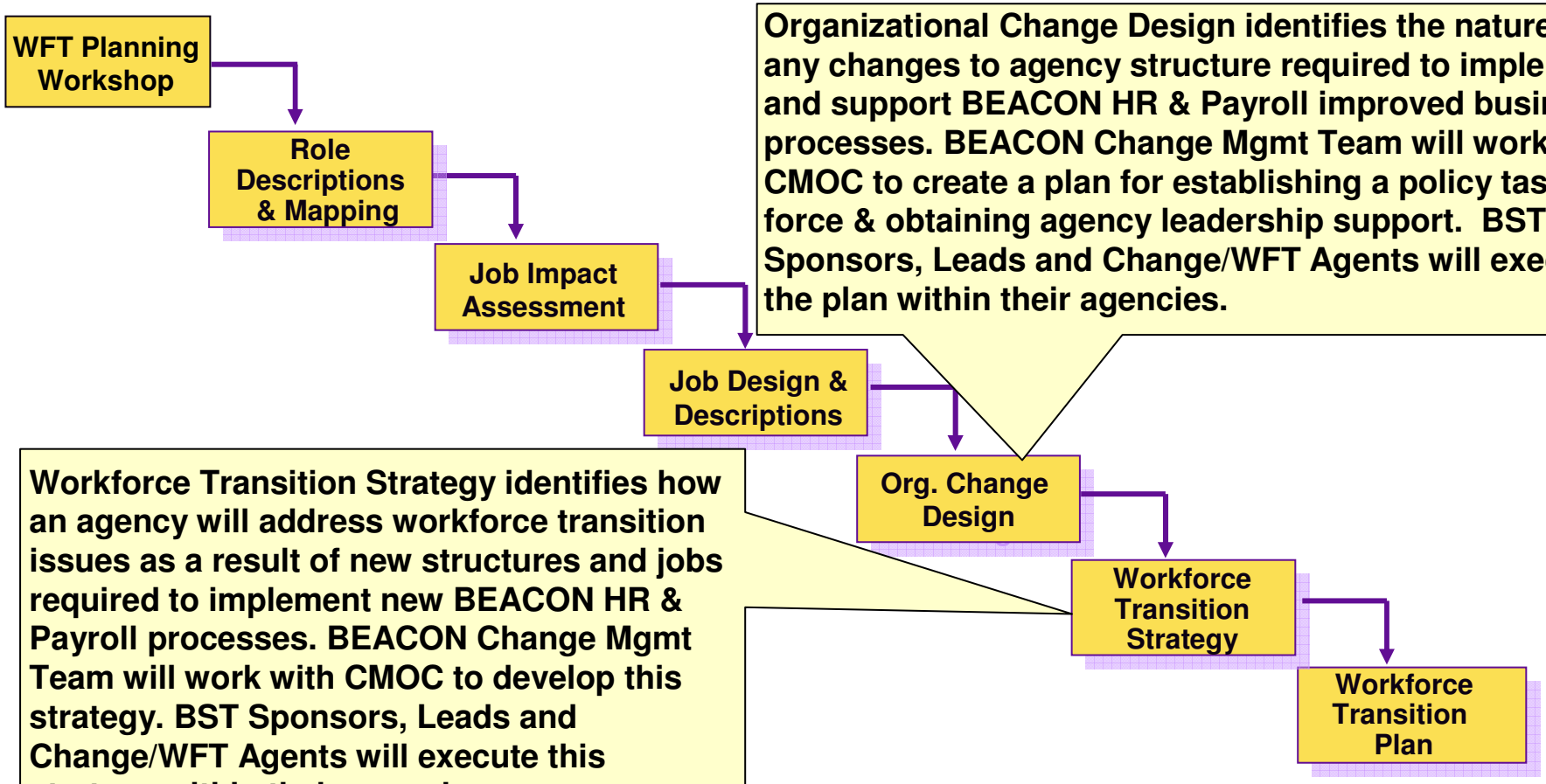
# Workforce Transition Activities & Expectations



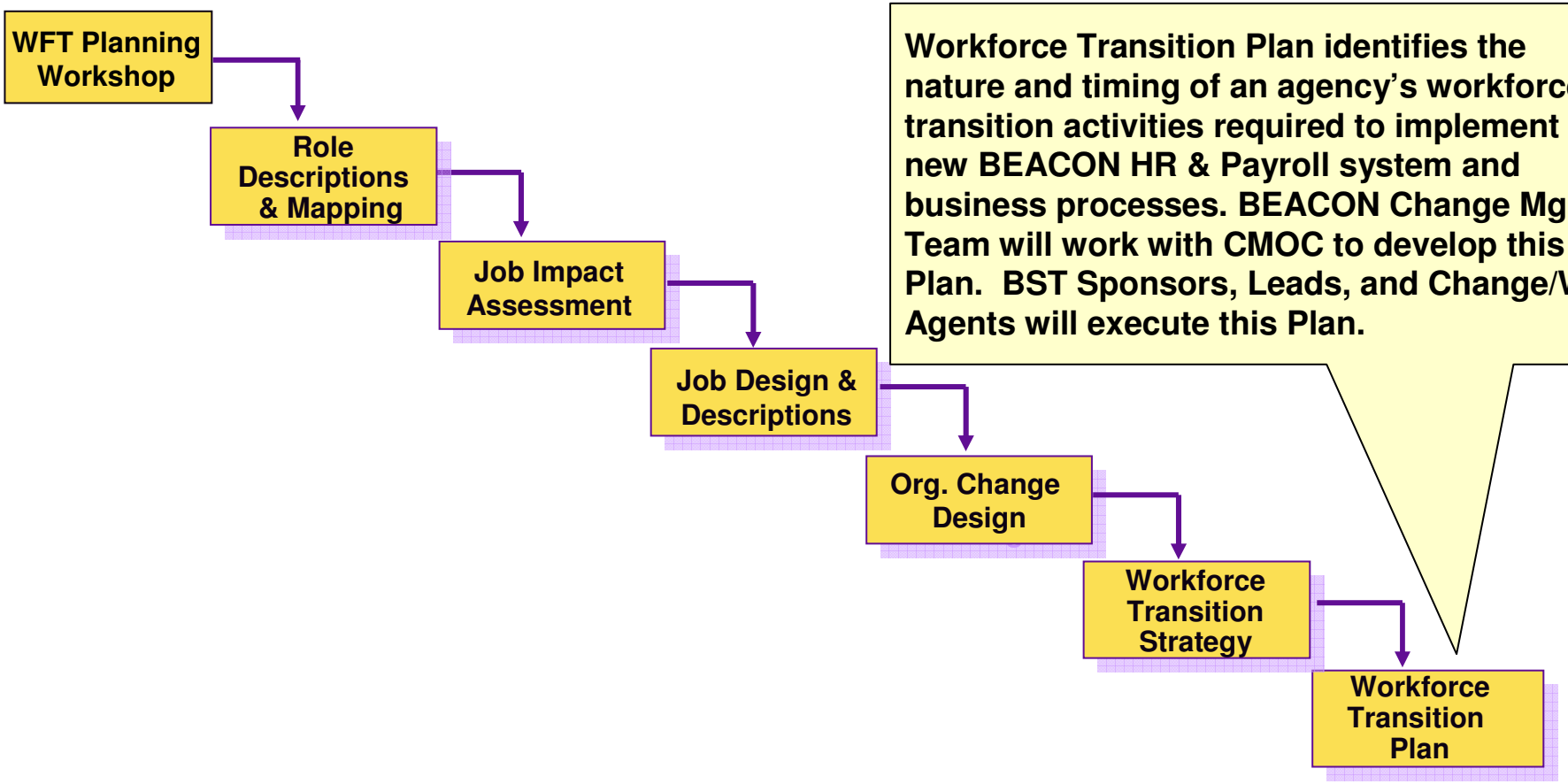

**Job Design and Description activities will focus on developing/validating agency jobs. BEACON Change Mgmt Team will work with CMOC to determine process for agency job development / validation, rollout and obtaining agency leadership support. BST Sponsors, Leads and Change/WFT Agents will develop / validate agency job descriptions for their agencies.**

**Job Impact Assessment will assess current HR & Payroll jobs and then develop a matrix of job roles & responsibilities, types of changes job roles will experience, and degree of impact these changes will cause within each agency. BEACON Change Mgmt Team will work with CMOC to coordinate the agency assessment workshops. BST Sponsors, Leads and Change/WFT Agents will execute the workshops within their agencies.**

# Workforce Transition Activities & Expectations



# Workforce Transition Activities & Expectations



# Upcoming Project Activities

# Upcoming Project Activities

**What do we need from you?**

- Communicate BEACON HR/Payroll Project information to agencies
- Examine Agency Scorecard information to determine areas that need to be addressed
- Participate in Wave 2 Design Sessions
- If appropriate, submit any remaining Design Session questionnaires

# Upcoming Project Activities

**What can you expect from us?**

- Distribute Wave 2 Design Session invitations/communications
- Update BEACON HR/Payroll Project website on weekly basis
- Draft July/August edition of “The BEACON View” newsletter
- Communicate organizational risk assessment findings
- Develop Communications Toolkit for BST Leads/Communications Agents
- Participate in State Employee Association of North Carolina (SEANC) Convention September 7th – 9th

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# Questions

# Upcoming BST Lead Meetings

| Date | Time |
|---|---|
| Tuesday, September 19 | 10 am – 11 am |
| Tuesday, October 17 | 10 am – 11 am |
| Tuesday, November 14 | 10 am – 11 am |
| Tuesday, December 12 | 10 am – 11 am |

**Check out the BEACON HR/Payroll Project website at:**

***www.beacon.nc.gov***

# BEACON HR/Payroll Project Resources

If you have any questions pertaining to the BST, please contact:

- **Edward Brodsky**
  edward.brodsky@ncosc.net
  Phone: 919-431-6520

- **Tom Legare**
  thomas.legare@ncosc.net
  Phone: 919-431-6521

- **Chris Loso**
  christopher.loso@ncosc.net
  Phone: 919-431-6522



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